

PERIODIC INVESTMENT PLAN (PIP)

Please complete the following information: (one account per form)

Account Title:	
Account Number:	Rep Name:

I/We hereby authorize Pershing, the clearing broker dealer, to do periodic investments as indicated below:

Please complete all information. (Any item that has not been completed will delay processing of this form and placing of periodic trades.)

FUND NAME	SYMBOL	\$ AMOUNT	TRADE DATE

FREQUENCY: Monthly Quarterly Semi Annually Annually

Breakpoint Level Obtained:

None Applies \$25,000 \$50,000 \$100,000 \$250,000 \$500,000 \$1,000,000

One of the following must be checked:

- I already have the above mutual funds in my brokerage account.
- I am placing my initial purchase, please process this PIP.
- The information above replaces the current PIP instructions on the account.

Client Signature	Date	Client Signature	Date
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*****SETTLEMENT INSTRUCTIONS*****

Please debit my Bank by using ACH **(Complete the Pershing ACH Authorization Agreement)**

I understand that the attached settlement instructions may change any current settlement instructions on my brokerage account.